



Washington State Transportation Commission
WSF General Market Assessment – VOWS Survey
June 2014
Executive Summary Presentation

Methodology



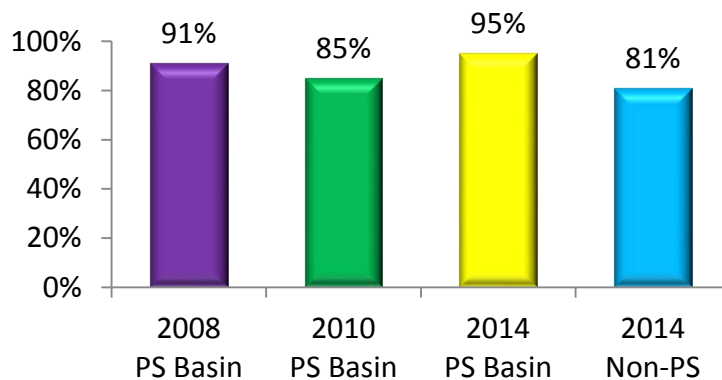
- ❖ The following report presents the findings from the general market assessment research. The main objectives of this research are to understand:
 - How are the ferries utilized by three distinct groups:
 - **1) Eastside of Puget Sound,**
 - **2) Westside of Puget Sound and**
 - **3) Residents living in Non Puget Sound areas**
 - How important do residents think WSF is as a contributor to the overall economy and recreation/tourism in the Puget Sound region?
 - What are residents feelings towards who should pay for WSF operational and capital costs?
- ❖ A total of 5,637 online interviews were conducted in June 2014 via the Voice of Washington State (VOWS) online panel and weighted to be proportionate to the state population.
- ❖ Throughout the report these terms are used to define the following segments.
 - Statewide refers to the total sample
 - **Puget Sound (PS)** refers to the sample of counties boarding the Puget Sound
 - **East side communities (PS-East)** are: King, Snohomish, Skagit, Pierce, etc. on the east side of Puget Sound
 - **West side communities (PS-West)** are: Kitsap, Clallam, Island, Jefferson, etc. on the west side of Puget Sound
 - **Non-Puget Sound communities (non-PS)** are all counties not boarding the Puget Sound

Ferry Ridership – 2008/2014



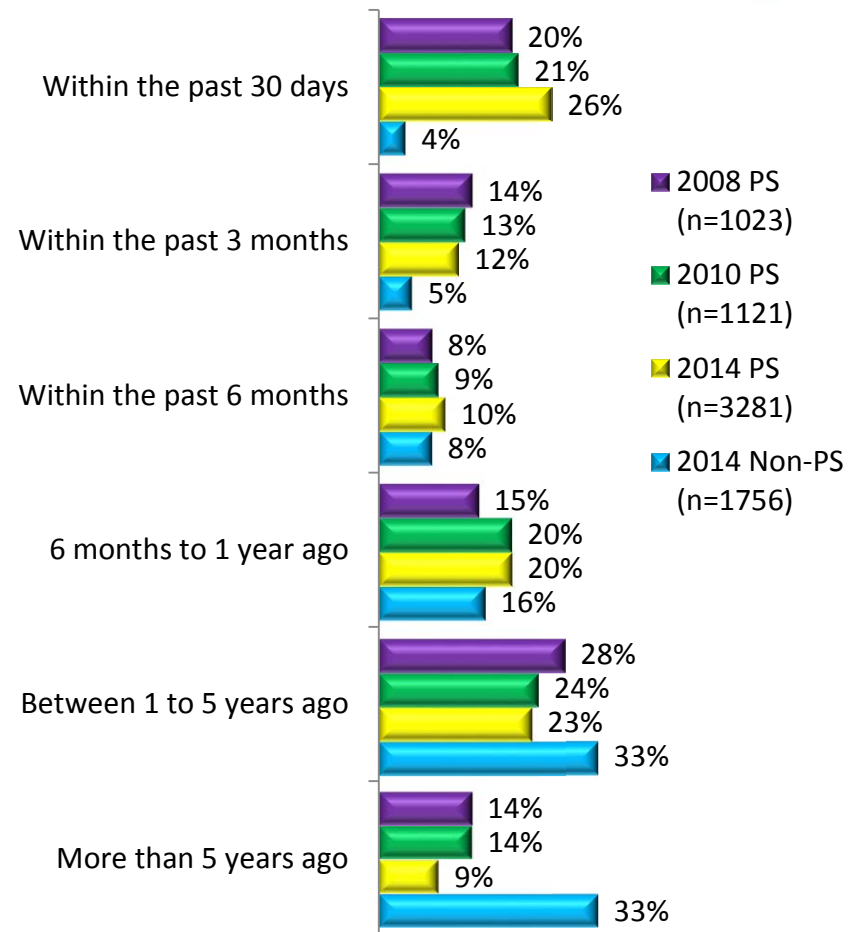
- ❖ Approximately 9 in 10 state residents (90%) in 2014 have ridden a WSF at some point in their lives.
- ❖ Puget Sound (PS) basin residents “ever” ridership in 2014 is 95% compared to non-Puget Sound (Non-PS) basin of 81%
- ❖ Timing of the last trip has been consistent since 2008 in the Puget Sound basin where two out of three have used WSF in the last 12 months.

Ferry Ridership (2008-2014)



Q1 Have you ever ridden a Washington State Ferry?
 Q3 When was the last time you rode a Washington State Ferry? Was it...

Last trip on WSF (2008-2014)

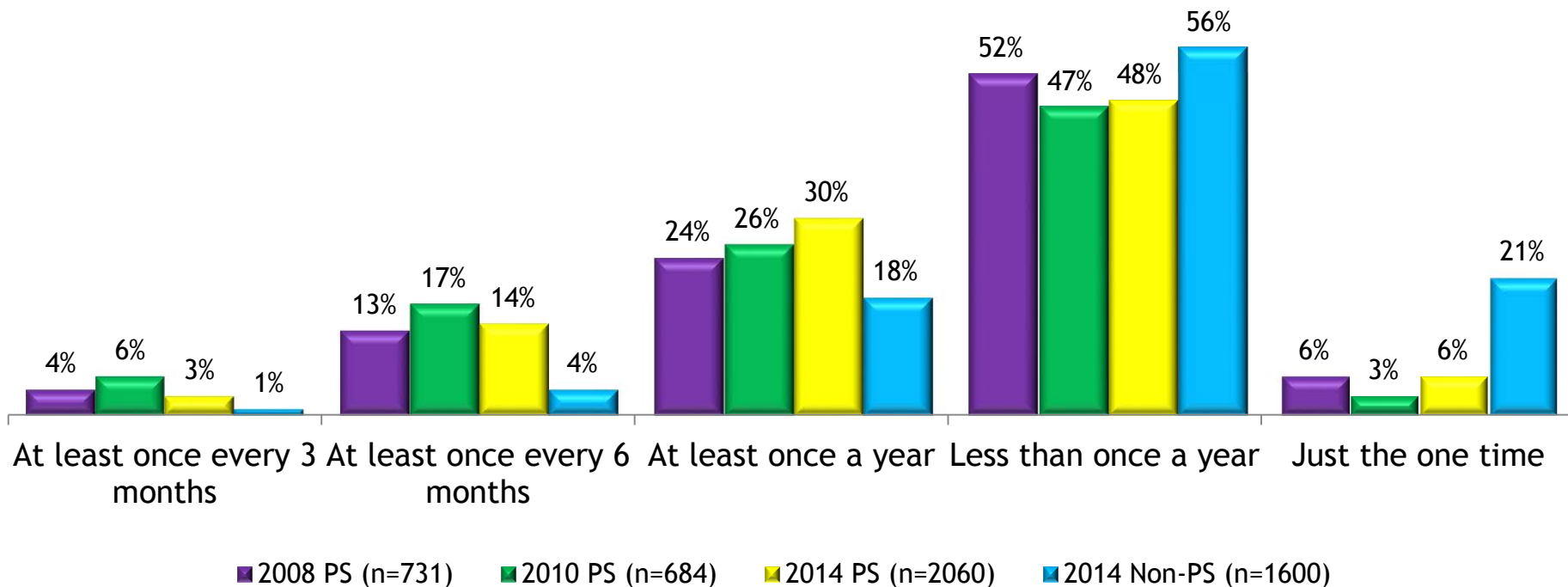


Travel Frequency – Infrequent Rider



- ❖ When looking at infrequent travelers (riders that travel less than once every 3 months) the WSF travel frequency in the Puget Sound basin has not changed considerably since 2008.

Travel Frequency by Infrequent Riders (2008-2014)

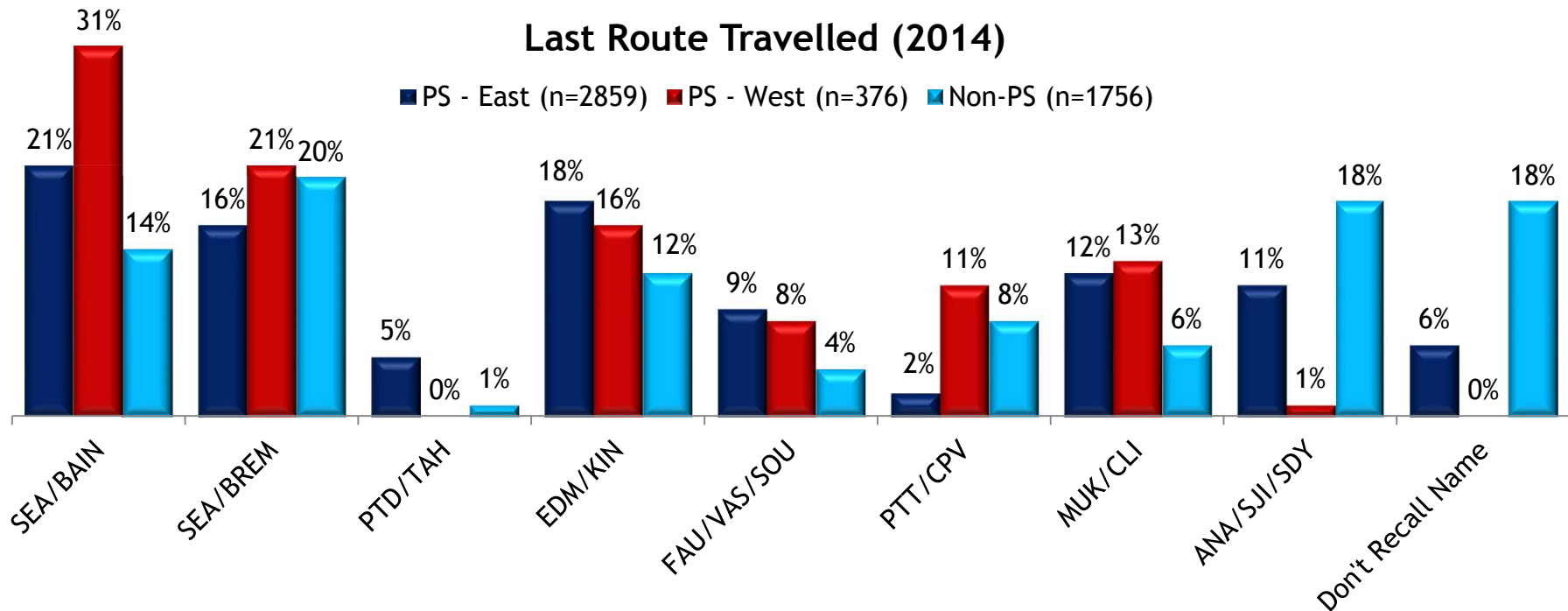


Q8 Approximately how often do you ride Washington State Ferries?

Last Route Travelled - 2014



- ❖ Residents in Westside Puget Sound basin communities tend to use Seattle – Bainbridge (31%) and Port Townsend (11%) more than their Eastside PS counterparts (21%, 2% respectively).
- ❖ Non-Puget Sound basin residents use Anacortes (18%) more often than their Puget Sound counterparts (11% Eastside, 1% Westside).



Q4 What was the last Washington State Ferry route that you took?

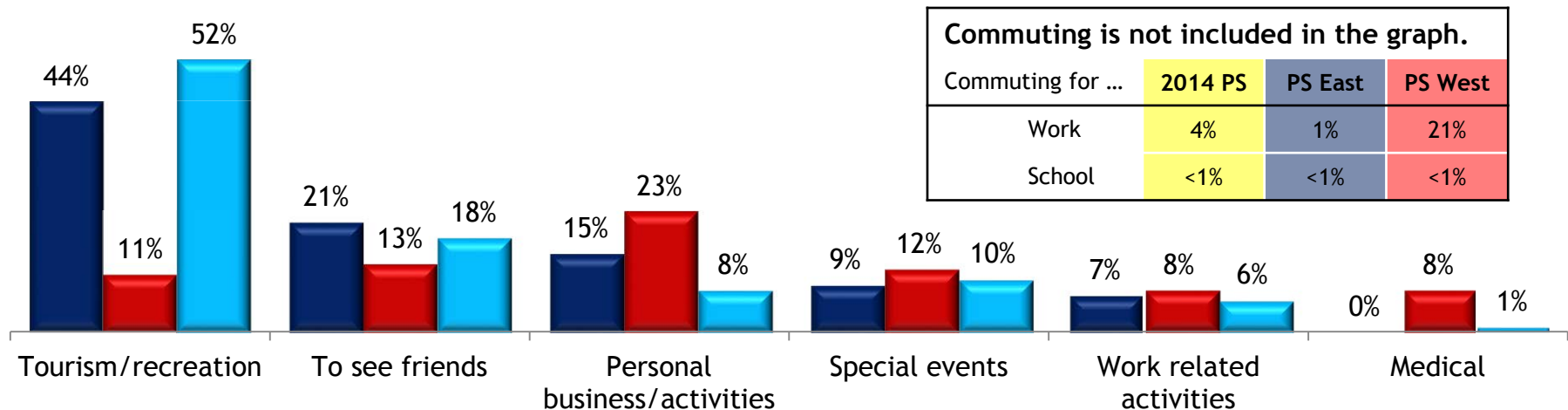
Last Trip Purposes - 2014



- ❖ Non-Puget Sound basin residents, like their Puget Sound basin Eastside counterparts, use the ferries more for tourism/recreation (52%, 44%) and to see friends (18%, 21%) than their Westside counterparts (11%, 13% respectively).
- ❖ Those living on the Westside use the ferries for work (21%) and personal business/activities (23%) more so than Puget Sound Eastside (1%, 15%) or Non-Puget Sound (0%, 8%) residents.

Most Frequently Mentioned Trip Purpose (2014)

■ 2014 PS-East (n=2859) ■ 2014 PS-West (n=376) ■ 2014 Non-PS (n=1749)



Q6 You said your last ferry ride was on the [INSERT RESPONSE FROM Q3] ferry. What was your primary purpose for that particular trip?

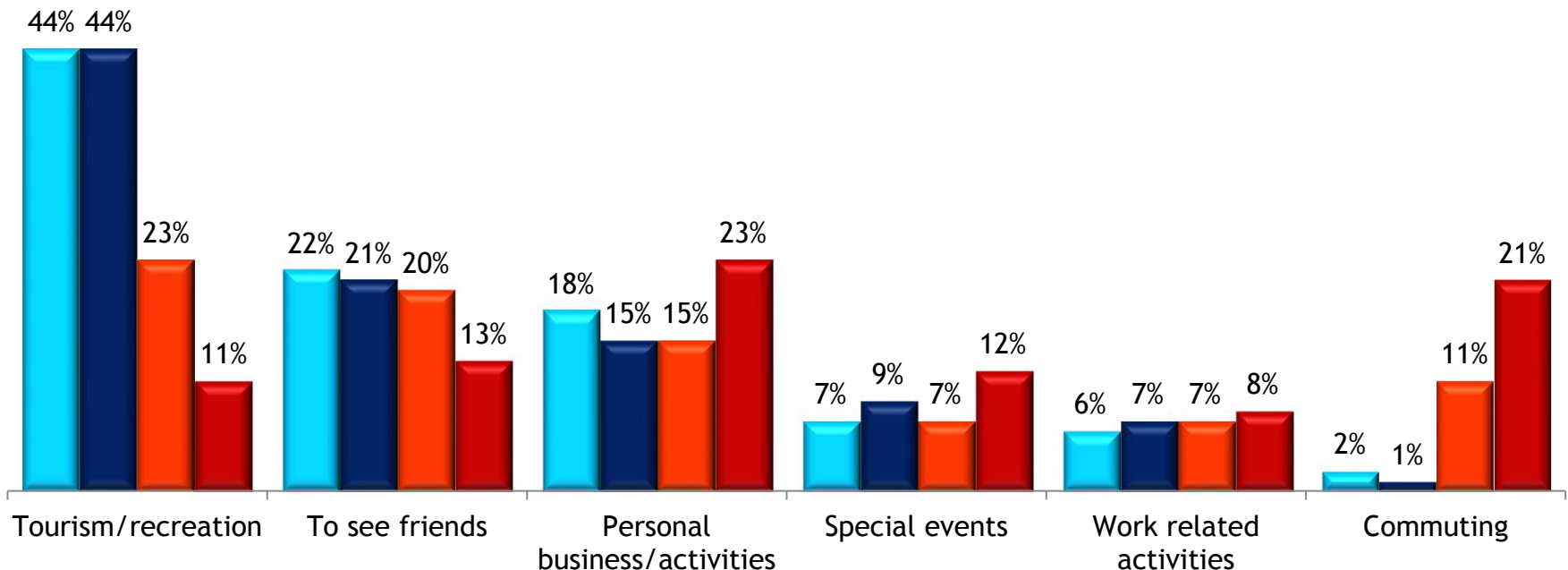
Last Trip Purposes – P.S. Comparison



- ❖ The results are consistent between 2010 and 2014 for trip purposes within the Eastside Puget Sound basin.

Most Frequently Mentioned Trip Purpose East/West (2010-2014)

■ 2010 PS-East (n=840) ■ 2014 PS-East (n=2859) ■ 2010 PS-West (n=128) ■ 2014 PS-West (n=376)



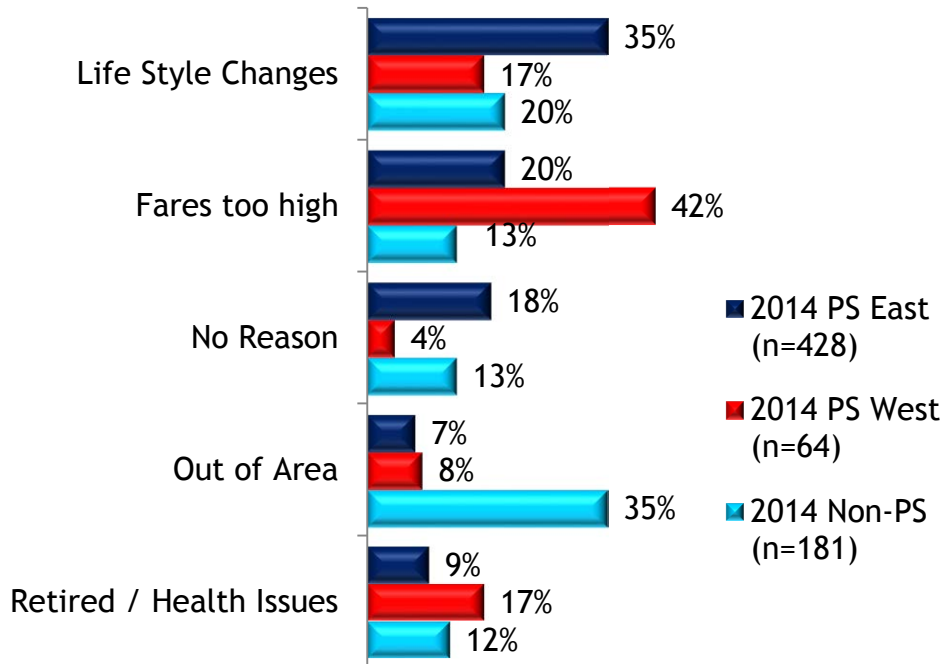
Q6 You said your last ferry ride was on the [INSERT RESPONSE FROM Q3] ferry. What was your primary purpose for that particular trip?

Reason For Riding Less - 2014



- ❖ Among the 14% (n=677) statewide who have decreased their ridership of WSF, the two most frequently mentioned reasons for riding less frequently are: “change in life style” 29% and “ferry fares are too high” 20%.

Main Reasons for Riding Less:



- ❖ Among the 14% (n=689) statewide who have stopped riding completely, the main reasons for doing so are:

- 35% No Reason / No need
- 34% Out of area
- 18% Life style changes
- 11% Fares too high

- ❖ Among the 6% (n=301) statewide who have increased their ridership of WSF, the main reasons for doing so are:

- 42% Life style changes
- 26% Work / School changes
- 13% Shopping / Events
- 12% Recreational outings

Q11 What is the primary reason you are riding Washington State Ferries less often?

Q12 What is the primary reason you have stopped riding Washington State Ferries completely?

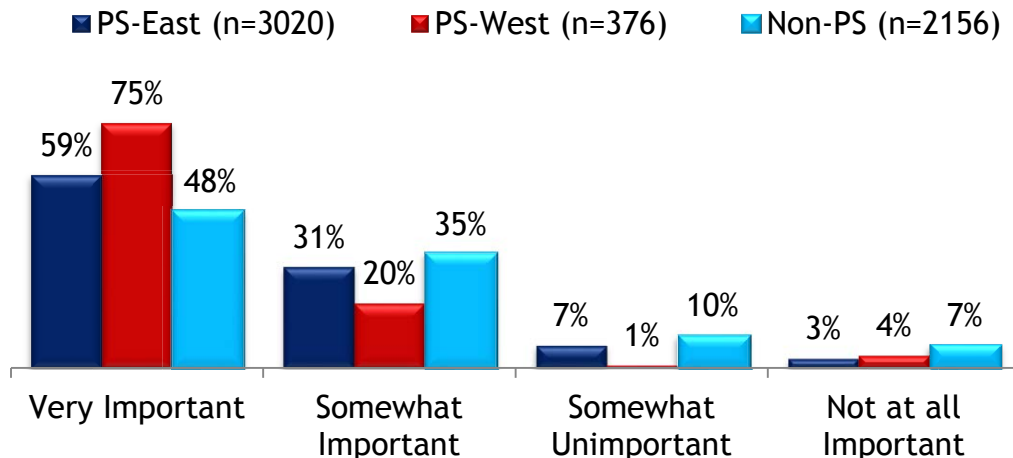
Q13 What would you say are the primary reasons that you are riding WSF more often?

WSF Importance - 2014

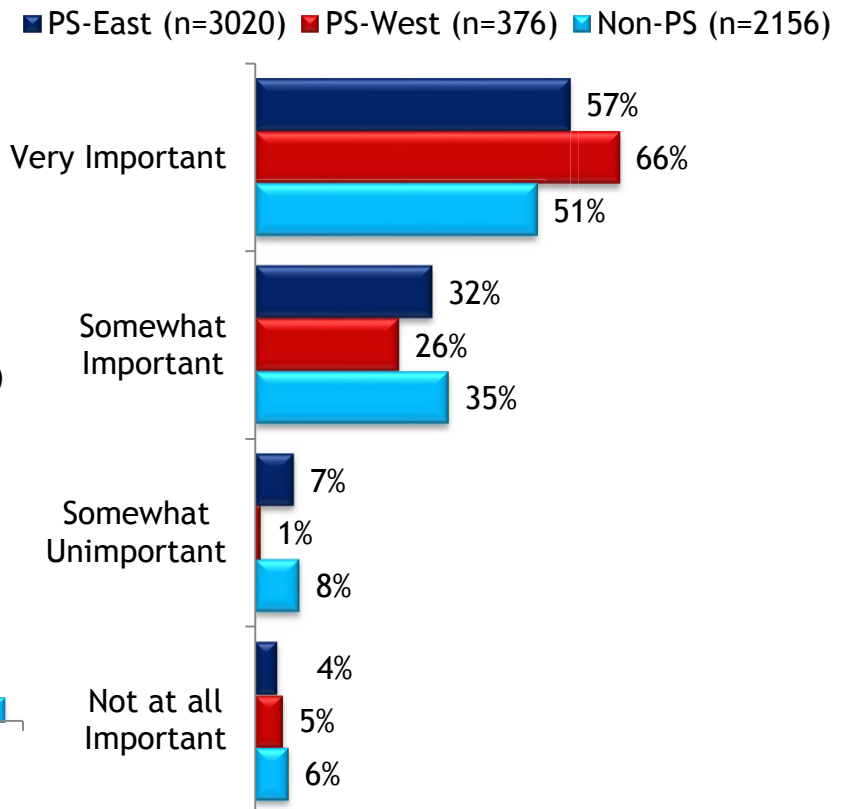


- ❖ The perceived importance of WSF to the general Puget Sound economy, growth and tourism is over 80% statewide.
- ❖ The perceived economic importance of WSF is only 7 percentage points higher in PS-East (90%) than Non-PS (83%).

Importance of WSF to Economy and Growth of the PS Basin (2014)



Importance of WSF to Encouraging Tourism in PS Basin (2014)



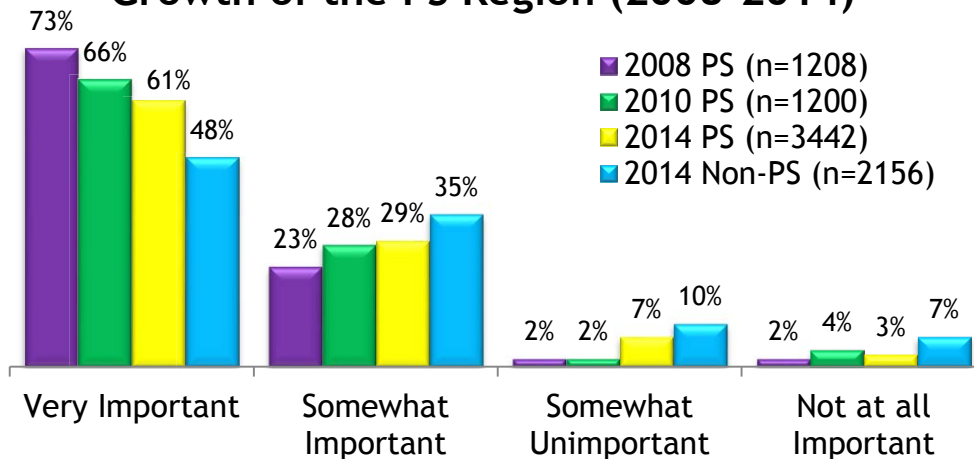
- Q15 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to the general economy and growth of the Puget Sound region? Would you say...
- Q16 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to encouraging tourism in the Puget Sound region? Would you say...

WSF Importance – 2008/14



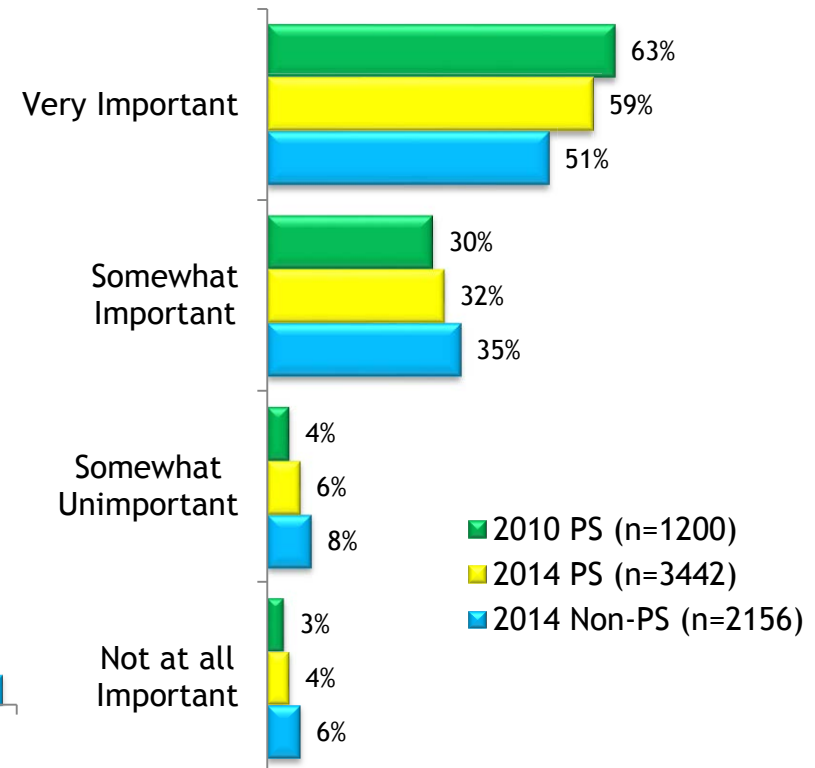
- ❖ The perceived importance of WSF to the Puget Sound Economy for all PS residents has declined from 2008 (96% important) to 2014 (90%).
- ❖ Eight out of ten Non-PS residents say WSF is important to the economy of PS (83%) and to encourage tourism (86%).

Importance of WSF to Economy and Growth of the PS Region (2008-2014)



- Q15 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to the general economy and growth of the Puget Sound region? Would you say...
- Q16 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to encouraging tourism in the Puget Sound region? Would you say...

Importance of WSF to Encouraging Tourism in PS Region (2010 - 2014)



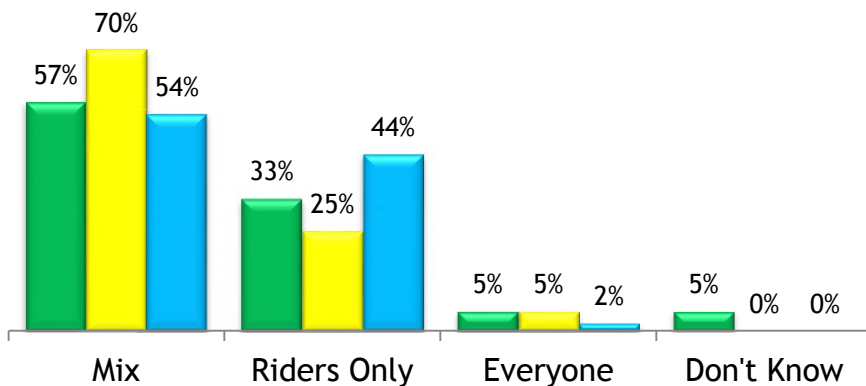
Operations Funding – 2010/14



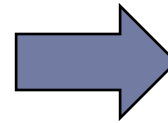
- ❖ More PS riders in 2014 (70%) than in 2010 (57%) feel that daily operations should be paid for by a mix of rider's fares and general gas taxes.
- ❖ 2014 non-PS residents are more likely (44%) to say “riders only” should pay the daily operation costs than their Puget Sound counterparts (25%).
- ❖ Statewide, sixty-three percent (63%) say daily operations should be paid for by a mix (riders and everyone) and that the rider portion of costs should be 53.5%.

How WSF Daily Operations Should Be Funded (2010 - 2014)

■ 2010 PS (n=1200) ■ 2014 PS (n=2397) ■ 2014 Non-PS (n=1157)



Mix of ferry
riders and
statewide
taxes
63%
(statewide)



In 2014 those that said mix suggested a ferry riders should pay on average **53.5%** of WSF's daily operating costs (53.5% PS, 53.7% Non-PS)

- Puget Sound Eastside residents report that riders should pay an average of 54.2%
- In comparison PS Westside residents said 49.3%, while Island dependent residents said 44.0%.

- Q17 Which of the following three ways to pay for the daily operations of the ferry system do you support the most? Do you believe that the cost of daily operations should be covered by:
- Q18 What percent of the daily operation costs do you feel riders should pay?

Fare Coverage - 2014

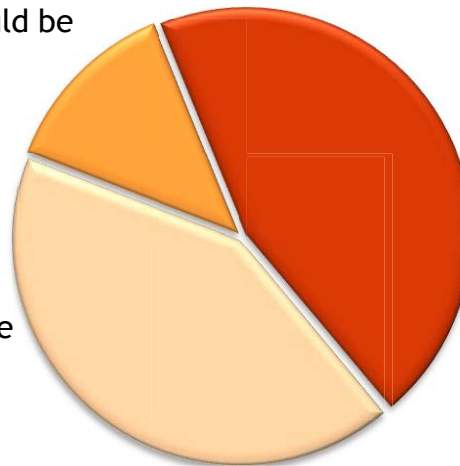


- ❖ Almost half (45%) of residents statewide in 2014 think that it is appropriate that ferry fares cover 2/3 of daily operating expenses.
- ❖ Four out of ten residents statewide (42%) in 2014 think fares should cover a higher percent than just two thirds of daily operating costs.

How Much Should Fares Cover of Annual Operating Costs (2014 Statewide)

Ferry fares should cover a lower percentage of operating costs and more gas tax dollars should be used to support ferry operational costs.
13%

Ferry fares should cover a higher percentage of operating costs.
42%



Two-thirds is an appropriate amount of the operating costs to be covered by ferry fares.
45%

(n=5598)

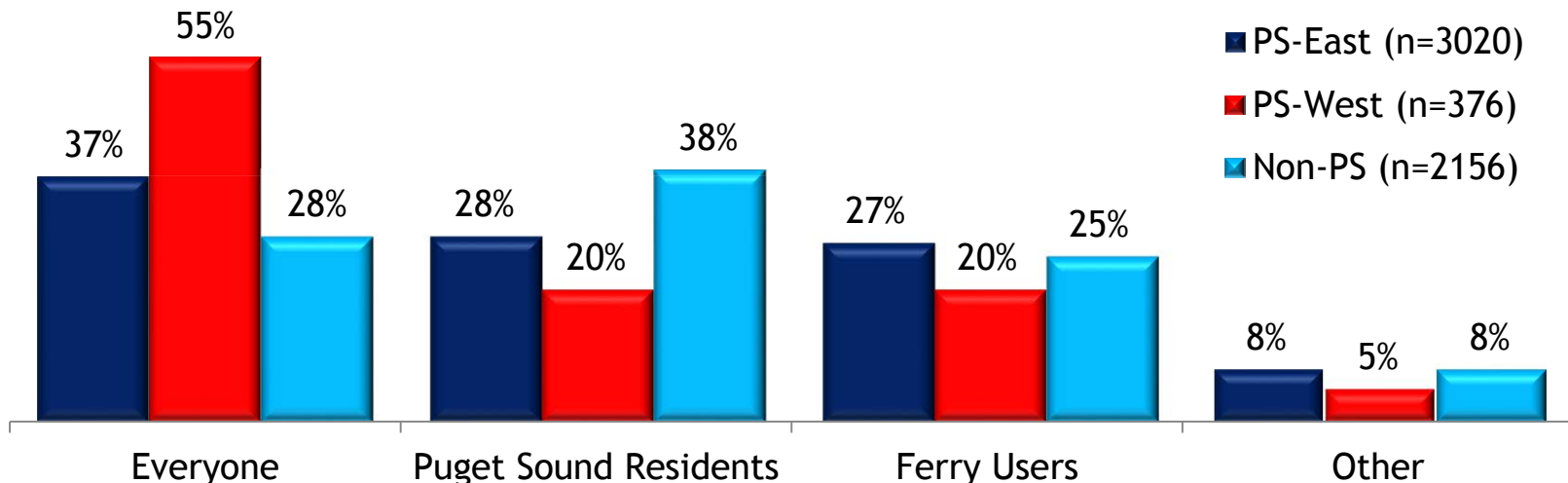
Q20 On average, fares cover about two-thirds of the ferries' yearly operating costs. The other third is subsidized by gas taxes raised from citizens across Washington State. Knowing that, do you feel ferry fares should cover a higher, lower, or the current percentage of yearly ferry operational costs?

Capital Funding - 2014



- ❖ Statewide residents are divided in roughly thirds when it comes to who should pay for capital investments (Everyone – 35%, PS Residents – 31%, Ferry Riders – 26%).
 - Westside residents are significantly more likely to say “everybody” should pay for capital improvements (55%) compared to Eastside (37%) and non-Puget Sound Basin (28%) residents.

Who should pay for capital investments? (2014)



Q21 Daily ferry operations are one cost, and they are covered about two-thirds by ferry fares and one-third by state gas tax subsidies. But there is also a cost to build new or replacement ferries and terminals as the fleet ages or to add new boats as the population of Washington grows. The state needs to budget for this capital cost through some form of taxes. In your opinion, should the state raise the money for new or replacement ferries and terminals from:

Executive Summary



Ferry Ridership:

- ❖ Approximately **9 in 10 state residents (90%)** in 2014 have (ever) ridden a Washington State Ferry (WSF) at some point in their lives.
- ❖ **Non-Puget Sound basin residents, like their Puget Sound basin Eastside counterparts**, use the ferries **more for tourism/recreation** (52%, 44%) and to see friends (18%, 21%) than their PS Westside counterparts (11%, 13% respectively).
- ❖ Among the 14% (n=677) statewide who have decreased their ridership of WSF, the two most frequently mentioned reasons for **riding less frequently** are: **“change in life style” 29%** and **“ferry fares are too high” 20%**.
- ❖ The **perceived importance** of WSF to the general Puget Sound economy, growth and tourism is over **80% statewide**. The perceived economic importance of WSF is only 7 percentage points higher in PS-East (90%) than Non-PS (83%) regions.

Executive Summary



Attitudes Towards Funding:

- ❖ **More PS riders in 2014 (70%)** than in 2010 (57%) feel that daily operations should be paid for by a **mix of rider's fares and general gas taxes**.
- ❖ **Non-PS residents in 2014 are more likely (44%) to say "riders only" should pay** the daily operation costs than their Puget Sound counterparts (25%).
- ❖ Statewide, sixty-three percent **(63%) say daily operations should be paid for by a mix** (riders and everyone) and that the rider portion of costs should be 53.5%.
- ❖ **Almost half (45%) of residents statewide** in 2014 think that it is appropriate that ferry fares cover 2/3 of operating expenses. **Four out of ten residents statewide (42%)** in 2014 think fares should cover a higher percent than just two thirds of operating costs. **More Puget Sound residents in 2014 (37%)** feel riders should pay more than 2/3 than did in 2010 (29%).
- ❖ **Statewide residents are divided in roughly thirds** when it comes to who should pay for capital investments (Everyone – 35%, PS Residents – 31%, Ferry Riders – 26%).



THANK YOU!

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